

BREAKOUT DISCUSSION

The breakout should produce decisions, not general observations.

- 1** Three years from now, what must be different about our client base, service model, and advisor roles?
- 2** How many hours should each client segment receive annually compared with actual time consumed today?
- 3** What work should move away from the senior advisor, and how should that capacity be used?
- 4** Which clients should begin developing meaningful relationships with another advisor during the next twelve months?
- 5** What segmentation decision should our team make during the next ninety days?